



Monitor a Study

- Getting started 2**
 - Help and contact information..... 2
 - Browser, system, and connection requirements..... 2
 - How do I log in? 2
 - Navigating in EpicCare Link..... 4
 - How do I log out?..... 4
- Accessing the study participant chart..... 5**
 - Select a study participant’s chart..... 5
- Reviewing the study participant chart..... 5**
 - Find information quickly in the patient’s chart 5
 - Find research-related information in the study patient's chart 5
 - Use filters to narrow the list of information you see 6
 - View a patient's trending lab results in Results Review 6
 - Customize the way results appear..... 7
 - View a patient's allergies 7
 - View a list of the patient's current medical problems..... 7
 - View a patient's current medications..... 7
 - View a patient's history 7
 - View a patient's demographics..... 8
- Manage monitor access for a study..... 8**
 - Request a new study monitor account in EpicCare Link 8
 - Change your password..... 8

Getting started

EpicCare Link is a tool that provides real-time web access to patient information so you can access patients' study data.

EpicCare Link is a collection of different web pages, or activities, that correspond to different tasks. The activity that you use depends on what you want to accomplish.

This guide takes you on an introductory tour of EpicCare Link. The first pages include information to help you get started, such as browser requirements and how to log in. The rest of the guide contains explanations of how to use EpicCare Link.



Each organization configures Epic differently, so what you see in this guide might differ from what you see in your system.

Help and contact information

For help using an activity, click .

- If you forget your password or can't log in, call 405-271-8660.
- If you need to submit a help desk request, your help desk support is likely going to ask you for key technical information. To get this information, go to **Help > Session Information Report**.

Browser, system, and connection requirements

You must use one of the following Internet browsers to access EpicCare Link:

- Google Chrome 88 and any later versions
- Microsoft Edge version 88 or later
- Microsoft Internet Explorer 11
- Mozilla Firefox version 78 or later

EpicCare Link requires a minimum screen resolution of 1024x768 pixels. We recommend that you use a high-speed Internet connection to achieve the best system speed and performance.

How do I log in?

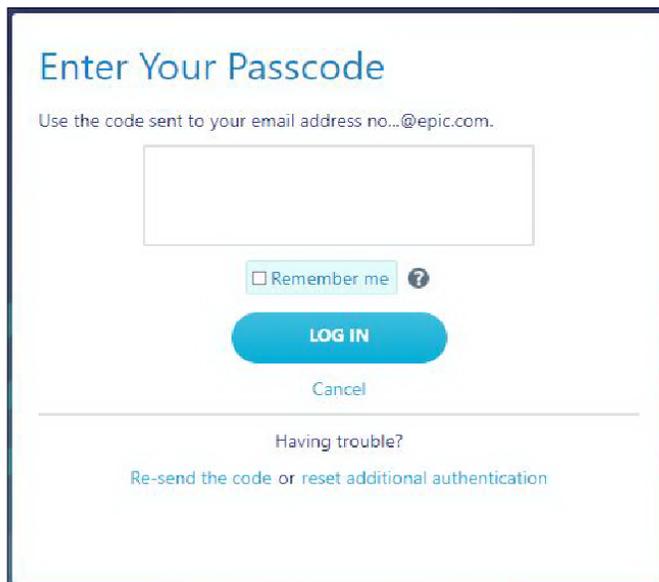
1. Open your web browser and go to link.ouhealth.com.
2. Enter the user ID and password that you received for EpicCare Link.
3. Enter your single-use passcode.

Set up an authentication method

When you first log in with your username and password, you're prompted to choose how you receive single-use passcodes that are required to access your account. This extra layer of security helps ensure that you're the only person who can log in to your account, even if someone knows your username and password.

You can receive the passcodes through a mobile application, a text message, or email. Each time you try to log in, you receive a passcode through your chosen method that you need to enter to finish logging in. Each passcode can be used only one time.

After you enter the passcode, you can select the **Remember me** check box to indicate that you're using a device that's not shared with anyone else. This means that you won't be asked for a passcode the next time you sign in from the same device for a period of time. Note that if you log in through a different device or browser, or your browser's settings are reset, you are still prompted for a passcode.



Record your reset code

When you set up an authentication method, the system gives you a reset code to use if you need to change how you receive passcodes. For example, if you get a new smartphone you can use the reset code to set up your new phone to receive passcodes.

Write down the reset code that appears on the screen and keep it private. You need to enter the reset code from the login screen if you need to change your authentication method. Note that you can also use this code to change your authentication method from the Settings menu after you log in.



A new passcode is sent to you each time you log in. Enter this code to complete the login process.

Unlike passcodes, the reset code appears only once after you set up your authentication method. Use this reset code only if you need to change how you receive passcodes.



Navigating in EpicCare Link

When you log in to EpicCare Link, several sets of navigation tools appear at the top of the page.

A) Navigation Tabs: Use these tabs to open different activities in EpicCare Link. Each tab contains one or more related activities. For example, the **Patient** tab contains patient-specific activities. When you click a tab, the default activity for that tab opens.

B) Activity Menu: Use this menu to open the various activities that are contained in the selected navigation tab. For example, the **Patient** tab activity menu contains the **Allergies** and **Chart Review** activities.

- If there are more activities than can fit on the screen, hover over the ellipsis on the far right of the menu to see all the activities contained in the tab.
- You can also click  to pin an activity so it appears first in the menu. If you pin multiple activities, they appear in the order that you pinned them. Click and drag pinned activities in the menu to change their order.

C) Action Options: Use these buttons, located on the top right of the screen, to see all of your available activities or to log out.



How do I log out?

To maintain patient confidentiality, you need to log out or secure your screen when you are done working or have to leave the computer for any reason. There are two ways to do this:

- Click  **Log Out**. The next time you log in, you are directed to your start page.
- Secure the computer by going to **Menu > Secure**. When you log back in, you return to the same activity that you were using before you secured the screen.

Accessing the study participant chart

Select a study participant's chart

1. Click **Select Patient**.



2. On the **Patient Search** tab:

- You see a list of all the patients the research coordinator has released to you.
- You will not be able to open a patient's chart if they have not been released to you.
- If you do not see any patients, or do not see all the patients you were expecting, work with the research coordinator for the study to get them released to you.

3. Double-click the patient's name to open their chart.

Reviewing the study participant chart

Find information quickly in the patient's chart

For patients with large charts, you can enter text in the **Search Chart** field to quickly find the information you need. For example, search for "cholesterol" to see a list of relevant matches in the patient's chart, such as lipid panel results and progress notes that mention cholesterol.

Find research-related information in the study patient's chart

Identify research-related information

The research icon  indicates something, such as an encounter or order, is linked to a research study.

Find active studies for a patient

After selecting a patient, review the **Research Studies** section from the **Patient Snapshot**. The **Active on Studies** section shows all studies the patient is currently participating in.

Patient SnapShot

SnapShot Race and Ethnicity

Demographics

Ellie Research
13 year old female
9/2/2006
Comm Pref:

321 Main St.
Madison WI 53717
555-555-5555 (H)

Guardians
Rsh Validate, Jessica (Mother) - 555-555-5555

Research Studies

Participation Preferences
OK to Contact: **Yes** (organizational default)
[View Full Preference Profile](#)

Active Studies

Name	Status	IRB #	
FS RESEARCH STUDY- INSOMNIA	Enrolled	9818881	Adverse Events
BREAST CANCER STAGE II- BRCA0142	Enrolled	1823718	Adverse Events

Allergies

Penicillins Hives

Find study-related documentation

From the **Research Studies** section of the **Patient Snapshot**, click the name of a study to view the Enrollment Report. This report provides a centralized place for viewing records linked to the study, including potentially:

- Encounters
- Consent forms
- Orders
- Adverse events

From the report, click on any of the links to view more details.

Use filters to narrow the list of information you see

You can also use filters to find visits, labs, medications, or other information in Chart Review. For example, on the **Encounters** tab, you can filter the list so you see only the visits associated with certain providers.

1. In Chart Review, select a tab.
2. Click **Filters** and select a filter type. Then, select check boxes next to the values that you want to see. For example, select Encounter Type, and then select the Billing Encounter filter.
3. Click **Apply** to make the results of your search appear.

To remove the search criteria and begin a new search, click **Clear All**.

View a patient's trending lab results in Results Review

1. Select the **Patient** tab and click **Results Review**.
2. Select the date range for the results data you want to see and click **Accept**.
3. To view a specific result component type, such as Hematology, or a specific result component, such as Hemoglobin, expand the tree on the left. Select the name of the component or component type that you want to view.

4. To view more columns of results, click **◀ Load More**. To view all columns of a patient's results for the time range that you selected, click **⏪ Load All**.



Click **⌚ Time Mark** so the next time you view the patient's results, you can easily distinguish any new results from those that you have already seen.

Customize the way results appear

1. In Results Review, click **☰ Options**.
2. To make the most recent results appear from left to right by default, select the **Trend Dates in reverse chronological order** check box.
3. Set your other default preferences, such as the default number of columns to show, using the other options.
4. Click **✔ Accept**.

View a patient's allergies

Select the **Snapshot** tab and review the Allergies section.



For more information about an allergy, click the allergy name to open a detail report.

View a list of the patient's current medical problems

Select the **Problem List** tab.



For more information about a problem, click the **View Details** icon.

View a patient's current medications

Select the **Snapshot** tab and review the Medications section.



For more information about a medication, click the medication name to open a detail report.

View a patient's history

Select the **Histories** tab to see a report with information about the patient's medical, surgical, family, and social history. Social history includes topics like tobacco use and sexual activity.



For a high-level summary of the current patient's chart, select **SnapShot** from the Clinical Review menu.

View a patient's demographics

Select the **Patient** tab and click **Demographics** to see a report with demographic information like the patient's address, PCP, emergency contacts, and more.

Manage monitor access for a study

Request a new study monitor account in EpicCare Link

1. Access OU Health EpicCare link here: link.ouhealth.com.
2. Click **Request New Account**.
3. To request access for a new study monitor, click **Request access for a new research monitor** and click **Continue**.
4. Enter the user's demographic information.
5. Enter company information in the Site Information section – select a site type of Clinical Trial Sponsor.
6. Add study-specific information in the Study Information section. If you are unsure what to specify here, contact the research coordinator for the study.
7. Enter a comment about your request, if necessary, and click  **Submit Request**.
8. After your request has been processed, the new user will receive a login instructions letter.

Change your password

1. Click the **Menu** button and select **Settings**.
2. Under User Settings, click **Change Password**.
3. Enter your current and your new passwords, then click **Accept**.